

Chapter Advisers

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ADDING AND EDITING CHAPTER AND ADVISER INFORMATION

LOGGING IN FOR THE FIRST TIME (NEW AND EXISTING CHAPTERS)

1. For existing chapters, click on the **“2014-2015 Affiliation”** button. If you are creating a chapter at your school for the very first time, click on **“First Time Chapter Affiliation”**.
2. Select your state from the **“State”** drop down menu
3. Select your school type from the **“School Type”** drop down menu
4. Fill in the remainder of the required fields (highlighted in red)
5. Enter chapter information on the right-hand side of the screen

Note: *Click on the question mark icon for definitions of Affiliation Types*

6. If the chapter and school address are the same, you may click the **“Chapter Address Same As School Address”** box to auto-complete the information.
7. Enter the chapter adviser information
8. Create and confirm password
9. Click **“Submit”** to continue OR click **“Cancel”** to delete information return to the welcome screen.

LOGGING IN WITH AN EXISTING ACCOUNT

1. Type your chapter ID number in the **“Username”** field
2. Type password in the **“Password”** field
3. Click on the **“Login”** button

Note: *If you have forgotten your password, please contact your state adviser*


HOW TO EDIT A CHAPTER’S INFORMATION:

1. Click on the **“Chapter Information”** tab
2. Make the appropriate changes to the **“Chapter Information”** form
3. To adjust address information, click on the **“Addresses”** link and make appropriate changes
4. Click on the **“Save”** button

HOW TO VIEW ALL CHAPTER STAFF:

1. Click on the **“Chapter Adviser(s)”** tab
2. Click on the **“Show All”** button

HOW TO ADD AN EXISTING ADVISER TO YOUR STAFF:

1. Click on the **“Chapter Adviser(s)”** tab
2. Click on the **“Choose Existing Adviser”** button
3. Click on the hand **“Add Adviser”**  icon to add the adviser **OR** click on the back button to cancel
4. Select **“primary”** or **“secondary”** from the **“Select Adviser Type”** pop-up window and select **“Add Adviser”**

Note: *Existing advisers are chapter advisers that have already been entered in the affiliation system*

HOW TO EMAIL ALL CHAPTER STAFF:


1. Click on the **“Chapter Adviser(s)”** tab

2. Click on the **“Email All”** button

HOW TO ADD CHAPTER STAFF:

1. Click on the **“Chapter Adviser(s)”** tab
2. Click on the **“Add Chapter Staff”** button
3. Make the appropriate changes to the **“User Information”** fields and/or the **“Address Information”** fields
4. Click on the **“Save”** button

HOW TO EDIT CHAPTER STAFF:

1. Click on the **“Chapter Adviser(s)”** tab
2. Click on the **“Edit”**  icon located beside the chapter staff name whose information you want edit
3. Make the appropriate changes to the **“User Information”** fields and/or the **“Address Information”** fields
4. Click on the **“Save”** button

ADDING, EDITING AND DELETING CHAPTER MEMBERS

HOW TO ADD STUDENT MEMBERS INDIVIDUALLY:

1. Sign in to the affiliation system
2. Click on the **“Members”** tab and then the **“Add Chapter Members”** button just below it
3. Complete all of the requested information. To select items from drop-down menus, click on the triangle icon on the right side of the cell, and select the appropriate item
4. Repeat until all chapter members have been added
5. Scroll down to the bottom of the screen and click **“save”**

Note: *Prefix, suffix, home phone and social media links are optional*

An invoice will NOT be generated until you click the red “Submit Affiliation” button under the “Members” tab. However, once you have your submitted affiliation, you will not be able to remove students. Students are not considered affiliated until payment has been received.

HOW TO UPLOAD STUDENTS AS A GROUP:



1. Click on the **“Members”** tab and then the **“Add Chapter Members”** button just below it
2. Locate the **“upload students”** Excel spreadsheet
3. Complete the spreadsheet, making sure to fill in all of the required fields
4. Highlight all of the chapter member information on the spreadsheet
5. Right-click and select **“Copy”** from the short-cut menu that appears
6. In the affiliation system, click on the top-left cell (under **“prefix”**)
7. Using your keyboard, press **Ctrl+V** to paste the chapter member information
8. Please be sure that all of the information transferred accurately
9. Scroll to the bottom of the screen and click **“Save”**

An invoice will NOT be generated until you click the red "Submit Affiliation" button under the "Members" tab. However, once you have your submitted affiliation, you will not be able to remove students. Students are not considered affiliated until payment has been received.

HOW TO SEARCH FOR A CHAPTER MEMBER:

1. Click on the "Members" tab
2. Type the appropriate search criteria in the search box:




3. Click on the magnifying glass icon  to Search
4. Click on the  to delete the search criteria


HOW TO SORT CHAPTER MEMBER INFORMATION:

Click on the column that you want to sort. You will see a triangle icon beside the column name which indicates that this is the column that is being used for sorting the information. When the triangle icon is pointing up, the information is being sorted ascending and if the triangle icon is pointing down, information is being sorted descending.

HOW TO ADD OR EDIT ADDITIONAL INFORMATION TO A CHAPTER MEMBER RECORD:


1. Click on the "Members" tab
2. Locate the appropriate chapter member in the members list
3. Click on the "Edit"  icon
4. Complete the "Student Information" form
5. Click on the "Addresses" Link
6. Complete the "Addresses" form
7. Click on the "Save" button

HOW TO REQUEST A CHAPTER MEMBER NAME CHANGE:

1. Click on the "Members" tab
2. Locate the chapter member whose name is to be changed
3. Click on the "Request Change"  icon
4. Complete the requested information
5. Type the reason for name change in the "Reason For Change" field
6. Click on the "Save" button

Note: Once you return to the Members screen, "Pending" will be displayed beside the chapter member's name until the change is approved. Once approved or denied, you will receive an email confirming approval or denial. If the name change was approved, it will be reflected on the Member screen.

HOW TO DELETE A CHAPTER MEMBER:

1. Click on the "Members" tab
2. Locate the chapter member in the Members list
3. Click on the "Delete"  icon
4. Click on the "Confirm" button to delete OR click on the "Close" button to cancel the delete

Note: You will only be allowed to delete unsubmitted chapter members. Once the chapter member has been submitted for affiliation, members cannot be deleted.

HOW TO SUBMIT CHAPTER MEMBERS FOR AFFILIATION:

1. Click on the “**Members**” tab
2. Click on the red “**Submit Affiliation**” button

Note: Once you click on the “**Submit Affiliation**” button, it will disappear until you have added more chapter members to submit. The Submit button will reappear once more student names have been added. You will receive an invoice via email for the chapter members that you submitted. An invoice number will also appear next to the chapter members whose names were submitted. Each time you submit chapter members, an invoice is generated. Additionally, a chapter member is not considered affiliated until payment is made and received into the system. Once payment is received and posted, the affiliation date will be displayed on the member screen as a visual indicator that the chapter member is fully affiliated for the year.

HOW TO PRINT THE STUDENT ROSTER:

1. Click on the “**Members**” tab
2. Click on the “**Print Student Roster**” button
3. Select “**PDF**” for a PDF format or “**CSV**” for an Excel format
4. Follow the on-screen instructions carefully to view or save the student roster

Note: Only chapter members that have been fully paid will appear on the student roster

HOW TO SEND AN E-MAIL TO ALL CHAPTER MEMBERS:

1. Click on the “**Members**” tab
2. Click on the “**Email All**” button

Note: Only chapter members who have an email address in their chapter member record can be emailed

HOW TO PRINT ALL MEMBERSHIP CARDS:

1. Click on the “**Members**” tab
2. Click on the “**Print Membership Cards**” button
3. Check the box in the title row to select all student names
4. Scroll to the bottom of the page and select the “**Print Membership Cards**” button

Note: Only chapter members that have been fully paid will have a membership Card available for print


HOW TO PRINT AN INDIVIDUAL MEMBERSHIP CARD:

1. Click on the “**Membership ID**” number in the Member Screen
2. Click on the “**Print Membership Card**” button
3. Check the box to the left of the name of the student for whom you wish to create a membership card
4. Scroll to the bottom of the page and select the “**Print Membership Cards**” button

Note: Only chapter members that have been fully paid will have a membership Card available for print

CREATING, VIEWING AND PAYING INVOICES

HOW TO VIEW INVOICES:

1. Click on the **“Invoice History”** tab
2. Locate the invoice you would like to view and click on the **“View”**  button
3. To download a copy, click the **“Download”** button

HOW TO PAY INVOICES USING A P.O. OR CREDIT CARD:

1. Click on the **“Invoice History”** tab
2. Click on the **“Pay Invoices”** button
3. Check the box next to the invoice that you wish to pay
4. To enter a P.O., complete the required fields under the **“Pay By P.O.”** section
5. To pay using a credit card, select **“Pay by Credit Card”** and complete the required fields
6. Once completed, click **“Pay”**



HOW TO SORT INFORMATION ON THE INVOICE HISTORY SCREEN:

Click on the column that you want to sort. You will see a triangle icon beside the column name which indicates that this is the column that is being used for sorting the information. When the triangle icon is pointing up, information is being sorted ascending; if the triangle icon is pointing down, the information is being sorted descending.

HOW TO SEARCH FOR AN INVOICE:

1. Click on the **“Invoice History”** tab
2. Type the appropriate search criteria in the search box



3. Click on the magnifying glass icon  to Search
4. Click on the  to delete the search criteria